eMARS 3.10 Upgrade
Reporting User Group Meeting
January 27, 2015

Kentucky
UNBRIDLED SPIRIT

➢ Continuing Migration Plan

➢ Access and Security

➢ Report Development

➢ MRDB$_2$

➢ Resources & Assistance

Continuing Migration Plan

Migration

➢Final Migration Date from infoAdvantage – **February 16, 2015**

  – Any report developer not yet named will need to be sent to Jacob Hicks (jacob.hicks@ky.gov) **prior** to this date

  – All remaining reports to be redeveloped in EBI 4.1 and not yet migrated will need to be placed in the report developers' Favorites; report leads' Favorites or Agency folders

Migration

➢ Migration from EBI TEST 4.1 to EBI UAT 4.1

- – Redeveloped reports should be renamed
  - • [User ID] – [Report Name]
- – Redeveloped reports should be copied to the *Redeveloped Reports Folder* in TEST
- – Reports should be validated and tested in UAT
- – Select "Basic" users to run reports and ensure data and report format is accurate
  - • Send your "Basic" user names and User ID's to Jacob Hicks (jacob.hicks@ky.gov)
  - • Use FY2013 prompts as that is the last completed FY in the test database
- – Reports within the *Redeveloped Reports Folder* will be migrated on specified migration dates

Migration

➢ Migration from EBI UAT 4.1 to EBI PROD 4.1

- – Copy reports from *Redeveloped Reports Folder* in UAT

- – Paste reports into proper Agency folder

- – Remove User ID from report name

- – Only Agency Folders are migrated

- – Only ONE migration date – **March 16, 2015**

How and When Your Reports are Migrated from infoAdvantage Production to EBI Production

infoAdvantage Production

EBI Test 4.1

EBI UAT 4.1

EBI Production 4.1

New reports in Agency Folders are moved

Migration dates:
~~10/15/14~~
~~12/1/14~~
1/19/15
2/16/15

Step 1 for Upgrade Team

New Reports in Developer or Leads Favorite Folders are moved

Step 1 for Report Developer: redevelop report

Step 2 for Report Developer: save and rename the report using this naming convention: **[User ID] - [Report Name]**

Step 3 for Report Developer: copy and paste the report into the folder below

Redeveloped Reports Folder

Migration Dates:
1/19/15
2/16/15
3/2/15
3/9/15-3/13/15

Step 2 for Upgrade Team

Redeveloped Reports Folder

Step 4 for Report Developer: copy report from the folder below

Step 5 for Report Developer: paste report into to correct agency folder above

Step 6 for Report Developer: remove USER ID from the report name once pasted into the Agency Folder

Cabinet
Dept
Dept
Dept

Reports with the same CUID are overwritten

Migration Date: 3/16/15

Step 3 for Upgrade Team

Cabinet
Dept
Dept
Dept

All users are part of one of the following groups:
- Report developers
- Basic Users who can refresh reports only

Access and Security

Explaining the Access Levels in EBI 4.1

Type of User	Access Level	Rights
Report Developer	eMARS Adv Content AL	• Add objects to folders • Copy objects to another folder • **Delete objects that ONLY the user owns** • **Modify objects that ONLY the user owns** • **Edit objects that ONLY the user owns** • Edit Query • Refresh report's data
Basic User	Basic Content AL	• View Objects • Refresh report's data • Can not Copy objects to another folder

Access/Security

Example of Agency Folder Rights in EBI 4.1

Folder Structure	Principal	Access Level
Agency Reports	All Dept Groups	View this Level Only
10 – Legislative Cabinet	Dept 005 Admin Users Dept 010 Admin Users Dept 005 Basic Users Dept 010 Basic Users	eMARS Adv Content AL eMARS Adv Content AL EBI Basic Content AL EBI Basic Content AL
005 – General Assembly	Dept 005 Admin Users Dept 010 Admin Users Dept 005 Basic Users Dept 010 Basic Users	eMARS Adv Content AL (Inherited) No Access EBI Basic Content AL (Inherited) No Access
010 - LRC	Dept 005 Admin Users Dept 010 Admin Users Dept 005 Basic Users Dept 010 Basic Users	No Access eMARS Adv Content AL (Inherited) No Access EBI Basic Content AL (Inherited)
Sub-Folders	Dept 005 Admin Users Dept 010 Admin Users Dept 005 Basic Users Dept 010 Basic Users	No Access eMARS Adv Content AL (Inherited) No Access EBI Basic Content AL (Inherited)

Current Folder Structure in EBI UAT 4.1

Admin Users may create folders at this level

This folder would have been created by a Dept 010 Admin User; notice Dept 005 Users do not have access to these folders

Report Developer Security/Access

➤ Can modify or delete reports they own

➤ Can create sub-folders

    – Can only delete folders they own

➤ When Report Developers leave:

    – Favorites can not be accessed

    – Reports owned by developer in Agency Folder must be copied/pasted to be modified

    – Reports owned by developer must be deleted by CRC

➤ When a developer is deleted from Business Objects all reports are then owned by the Administrator

    – Contact CRC

- Statewide Reports can no longer be copied by report developers
- If you use a Statewide Report as a template, contact CRC for a copy to be send to your Inbox

Basic Users Access

➢ View folders where rights are granted

➢ View reports located within those folders

➢ Run/refresh reports

➢ Unable to Copy reports to Favorites

– Able to copy a "Shortcut" to Favorites

Report Redevelopment

Agency Redevelopment

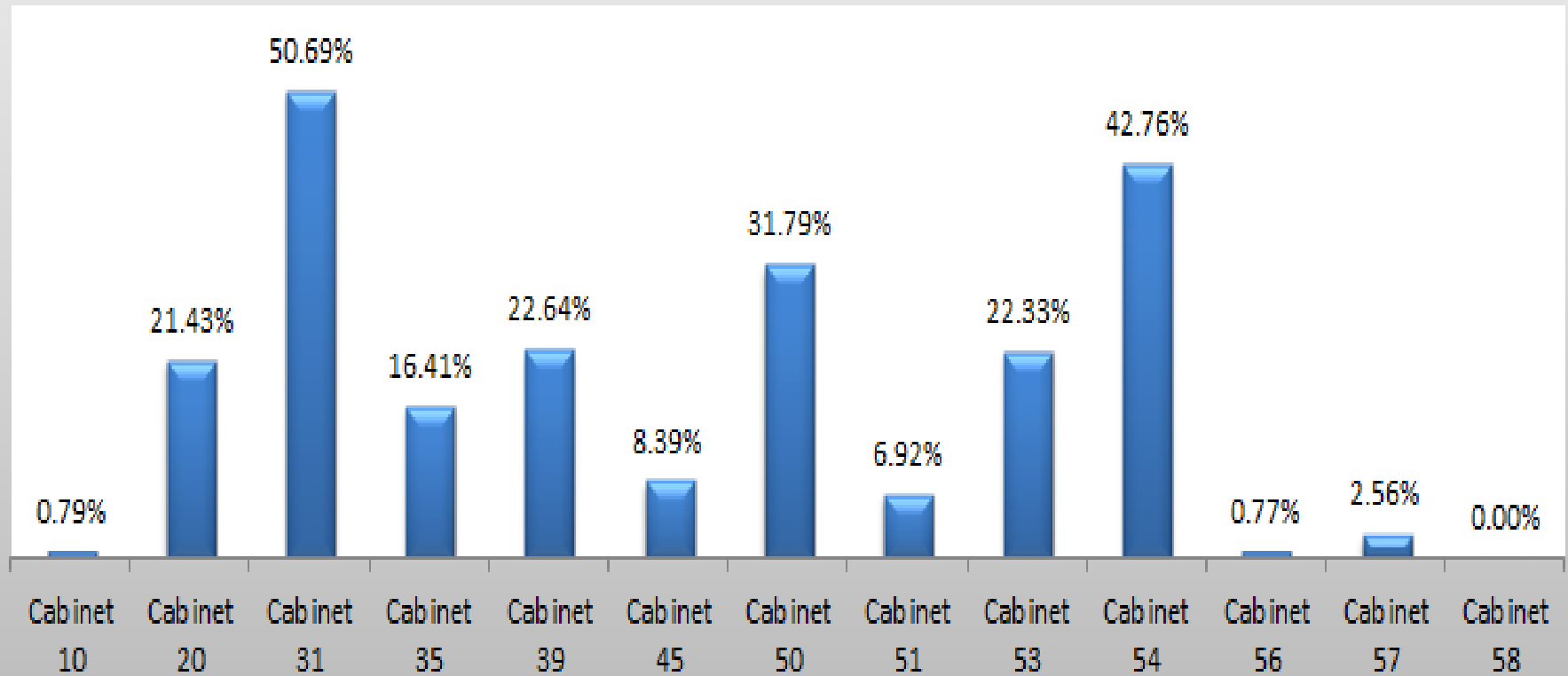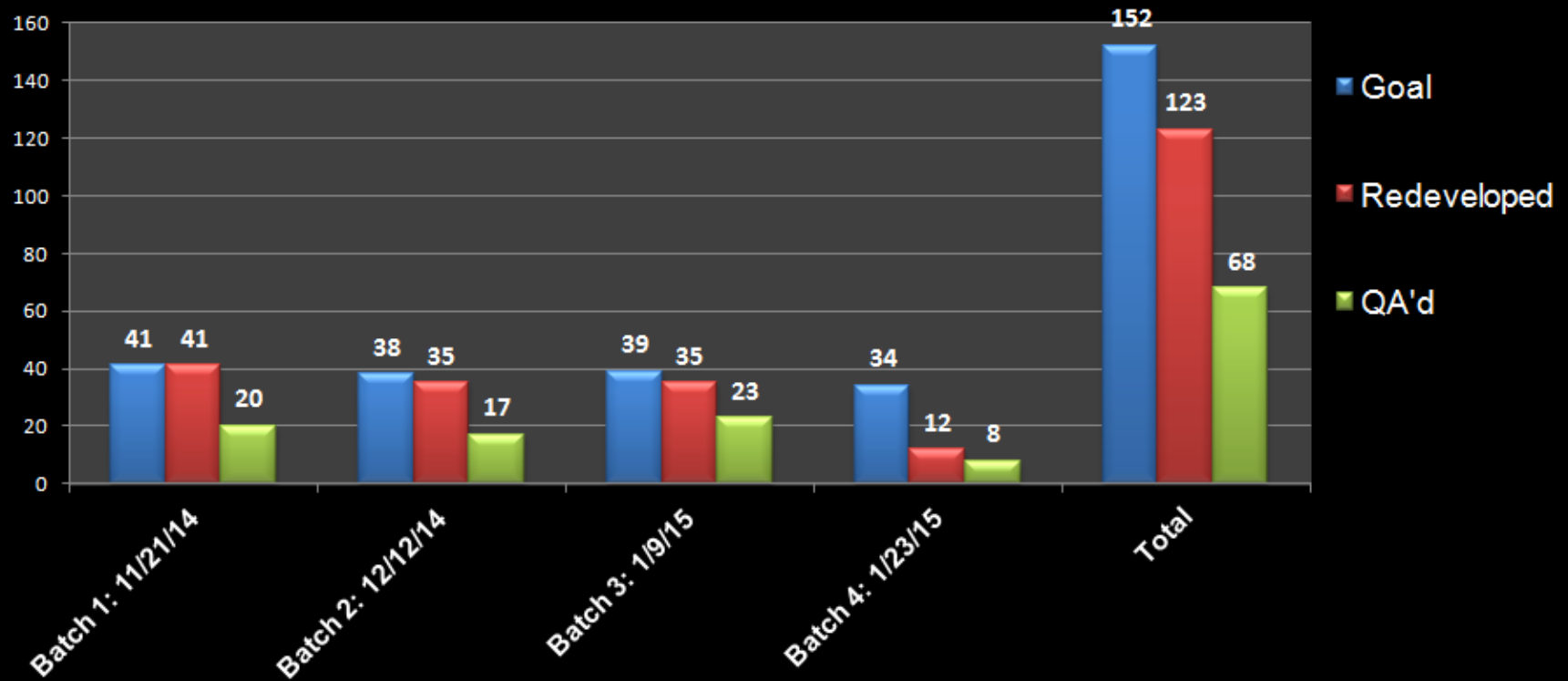| Cabinet	Not Redeveloped	Redeveloped	Total	Percentage
Cabinet 10	125	1	126	0.79%
Cabinet 20	11	3	14	21.43%
Cabinet 31	503	517	1020	50.69%
Cabinet 35	932	183	1115	16.41%
Cabinet 39	123	36	159	22.64%
Cabinet 45	131	12	143	8.39%
Cabinet 50	487	227	714	31.79%
Cabinet 51	847	63	910	6.92%
Cabinet 53	779	224	1003	22.33%
Cabinet 54	340	254	594	42.76%
Cabinet 56	513	4	517	0.77%
Cabinet 57	266	7	273	2.56%
Cabinet 58	169		169	0.00%
Totals	5226	1531	6757	22.66%

Agency Redevelopment

Agency Report Redevelopment as of January 23, 2015

Statewide Report Redevelopment

Tracking Report Redevelopment and QA

Redevelopment Reminders

➢ Get all reports to be redeveloped to infoAdvantage Favorites or Agency folders prior to **February 16, 2015**

➢ Follow proper naming convention

– [User ID] – [Report Name]

➢ Copy redeveloped reports to *Redeveloped Reports Folder* in EBI TEST

MRDB₂

➢ Allow users to access financial data through data warehouse views as opposed to InfoAdvantage

➢ Run queries as opposed to reports

➢ Export data from Microsoft Access to Microsoft Excel

Current Views

➢ **O_DW.VW_FCT1_EXPENDITURE**
  – Detailed expenditure information for accounting/budgeting needs

➢ **O_DW.VW_FCT1_REVENUE**
  – Detailed revenue information for accounting/budgeting needs

➢ **O_DW.VW_FCT1_CASH**
  – Detailed cash information for accounting/budgeting needs

➢ **O_DW.VW_FCT1_SUMMARY_LEDGER**
  – Summarized information for selected chart of account elements

➢ **O_DW.VW_FCT1_CHARGE**
  – Detailed charge information

Current Views

- ➤ O_DW.VW_FCT3_BUDGET_OPERATING
  - – Single record for each 2nd level budget reflecting the current budget amount.

- ➤ O_DW.VW_FCT3_BUDGET_GRANT
  - – Single record for each 2nd level budget reflecting the current budget amount.

- ➤ O_DW.VW_FCT3_BUDGET_CAPITAL_EXP
  - – Single record for each 2nd level budget reflecting the current budget amount.

- ➤ O_DW.VW_FCT3_BUDGET_CAPITAL_REV
  - – Single record for each 2nd level budget reflecting the current budget amount.

How to access data

➤ Contact Security Lead
  – email Donald Sweasy with request to MRDB$_2$ Views within EMIAFP

➤ Tools
  – Microsoft Access
  – Microsoft Excel
  – SQL Developer
  – Other Oracle Tools

Requires Oracle Client 11 or 12c Requires TNSNAMES.ora file

Resources & Assistance

Resources & Assistance

➢ eMARS Upgrade Page
  – Report Developer's Guide
  – Baseline Universe Compare
  – Presentations

➢ Report Development Workshops
  – State Office Building – Purple Parlor
  – CRC and CGI resources available to help with report re-development

Remember to use FY2013 data for testing reports.

February Workshops

➢ Contact your Agency's Training Team Lead with the Class Locator Number below to Register

Date	Time	Class Locator Number	Course Code	Location
February 3rd	8:30am-12pm	0000250168	EMARSREP	KSOB PURPLE PARLOR
February 4th	8:30am-12pm	0000250169	EMARSREP	KSOB PURPLE PARLOR
February 5th	1:00-4:30pm	0000250170	EMARSREP	KSOB PURPLE PARLOR
February 10th	8:30am-12pm	0000250171	EMARSREP	KSOB PURPLE PARLOR
February 11th	1:00-4:30pm	0000250172	EMARSREP	KSOB PURPLE PARLOR
February 12th	1:00-4:30pm	0000250173	EMARSREP	KSOB PURPLE PARLOR

What's Next

- Tie up loose ends
  - Report Developers not named?
  - Straggling Reports left in infoAdvantage
  - Send to Jacob.Hicks@ky.gov
  - Last migration from infoAdvantage **Feb 16, 2015**
- Redevelop…Redevelop…Redevelop
  - Naming Convention
  - Copy in Redeveloped Folder
  - Next Migration **Feb 16, 2015**
- Sign up for Workshops, if needed
- Performance Testing